

## **PROJECT TASKS and ASSIGNMENTS:**

### **Manager of Implementation - Timekeeping (Hillary):**

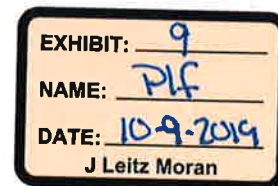
- Directory and Confluence Setup
- Notify ERP Deployment Team of New Contract & Install
- Send & Receive Client Welcome Packet
- Time Clocks:
  - Procure Time Clocks
  - Verification of Biometric/Existing Badge Testing
- Introduction to Project Manager

### ***---Handoff to Project Manager from Manager of Implementations---***

\*\*\*Technical Review Call\*\*\* - can be handled by Implementation Consultant  
Should happen prior to Server/Application Install

### **Project Manager:**

- Schedule Project Kick Off Call with Client/Notify Mgr of KO Call Date
- Project Kick Off Agenda
- Project Plan and Questionnaire Documents Provided to Client
- Server and Application Install [Deployment Billing]
  - Requires PSA Billing Task (non-util)
- Send and Receive Connectivity Document (Self-Hosted Clients)
- Complete VPN Worksheet (as applicable)
- Request VPN Configuration w/ SaaS Networking (as applicable)
- Project/Stakeholder Kick Off Call/Presentation
  - Due dates provided to client on completed questionnaire
- Map Project Plan to Go Live
  - **Acceptance due to Manager of Implementation 3 weeks after KO Call**
- Milestone: Project Timeline Acceptance
  - Notify Implementation Consultant with acceptance/timeline
- Integration:
  - Payroll Interface Installation (via PSA)
  - Obtain Integration Files (if flat file) OR
  - Verify and Test Payroll Connectivity
- Receive Completed Questionnaire
  - Review/Schedule SOW Discussion
- Scope of Work/Solution Design Discussion
- Create Scope of Work/Solution Design
- Receive Approved Scope of Work/Solution Design
- Receive Milestone: Scope of Work/Solution Design Acceptance
- Schedule Project Handoff to IC Call



### **IMPLEMENTATION CONSULTANT TO TAKE OVER PROJECT**

Items for Project Manager to handle while IC is working with client:

- Request/Receive Acceptance from client for:
  - Integration (Milestone Acceptance)
  - Power User Checklist
  - End and Super User Checklist
  - Go Live Checklist (All Sections) (Milestone Acceptance)
  - Training Acceptances (Milestone Acceptance)
- Document Payroll Export Design (if applicable)
- Project Closure:
  - Production Confirmation (Milestone Acceptance)
  - Client Transfer to Support
    - Criteria Met
    - Notification of Client Transfer to Support (Email Mgr)
    - PTS prep and scheduling
    - Project/PSA closure
  - Project Closure (Milestone Acceptance)
- Miscellaneous Tasks:
  - Project Timelines kept up to date and send bi-weekly
  - Hours watch
  - SM Billing

*---Handoff to Implementation Consultant to Project Manager---*

**Implementation Consultant:**

- Confluence Update (pre-requisite: Server/Application Installed)
- Project Handoff Call with PM:
  - Review Signed Scope of Work/Solution Design & have questions ready
- Schedule All Training's and Reoccurring Meetings
- Time Clocks (if applicable):
  - Obtain Time Clock Details and Setup Time Clock Server
  - Build Device Profiles and Ping Clocks
  - Clock Network Configuration Call
  - Time Clock Training
- Integration:
  - Integration Prep
  - Integration:
    - Flat File – Schedule via TSM Team
    - AsOne/Direct Connection – Perform Integration
  - Integration Approval Call/Integration Approval
    - Request PM reach out for milestone acceptance
- ExecuTime Setup & Configuration (Proceed once integration has been approved):
  - Create Pay Codes
  - Create Security Roles

- Overtime and/or Comp Time Configuration
  - Holiday Schedule Build
  - Shift Differential Configuration (if applicable)
  - Miscellaneous Configuration
  - Create Test User Accounts
  - Job Costing (if applicable)
- Email Setup/Configuration
- Authentication Configuration and Testing
- Power User Training Sessions
- Start Recurring Status Calls with Client
- Timecard Mock Ups
- End User Training(s)
- Super User Training(s)
- Test Payroll Export
- Payroll Export Training
- Refresh Payroll from Test
- 1<sup>st</sup> Parallel
- 2<sup>nd</sup> Parallel
- 1<sup>st</sup> production cutover
- End of Project Items (Project Closure):
  - Documentation Verification
  - CMI Warranty
- Miscellaneous Items:
  - Keep track of hours
  - Update Weekly Meeting Notes/Create Jira tasks for tickets/outstanding items
  - SM Billing